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South

CAROLINA

CLARENDON COUNTY

SITUATION ANALYSIS

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STATE DOCUMENTS

TABLE OF CONTENTS

POPULATION 1

INCOME.....4

ECONOMIC DEVELOPMENT.....7

LOCAL GOVERNMENT.....21

INFRASTRUCTURE23

PUBLIC EDUCATION25

INTRODUCTION

This Situation Analysis was prepared in conjunction with the Clarendon County Strategic Management project by the South Carolina State Development Board's Office of Rural & Community Development's Local Economic Action Planning (LEAP) program. The purpose of the Situation Analysis is to give the people of Clarendon County a better understanding of what their position is in relation to the environment in which they must compete economically. In order to accomplish this, throughout the document Clarendon County is compared to Calhoun, Sumter and Williamsburg Counties, their closest neighbors, as well as the state as a whole.

There is nothing new about strategic management. Adapted from the private sector in the early 1970's, it allows community leaders to build a consensus about the course they should pursue in order for their community to fulfill its economic potential. Communities of all sizes have used, and continue to use, strategic management as a means of positioning themselves to succeed in the emerging world economy. It is a long-range planning tool designed for communities wishing to take a pro-active stance to the future in order to manage change rather than simply react to it.

Change - making things different or becoming different. As we face the 21st Century, the world around us is changing as never before, making the things we do and the way we do them more and more different. Yesterday's state of the art technique will be made obsolete by new technology tomorrow. Computer skills have become mandatory in the work place as modern workers process information - the raw material of the 1990's. Modern communications systems have made the world smaller creating a world economy where information, goods, and capital flow across international borders. From the way we cook our meals to the way we do our business our lifestyles are changing - and the pace of change is staggering. Those who can not keep up - individuals, businesses *and* communities - will simply be left behind. By undertaking the LEAP process, the Clarendon County Council and Clarendon County Development Board are taking the first steps in assuring Clarendon County does not get left behind.

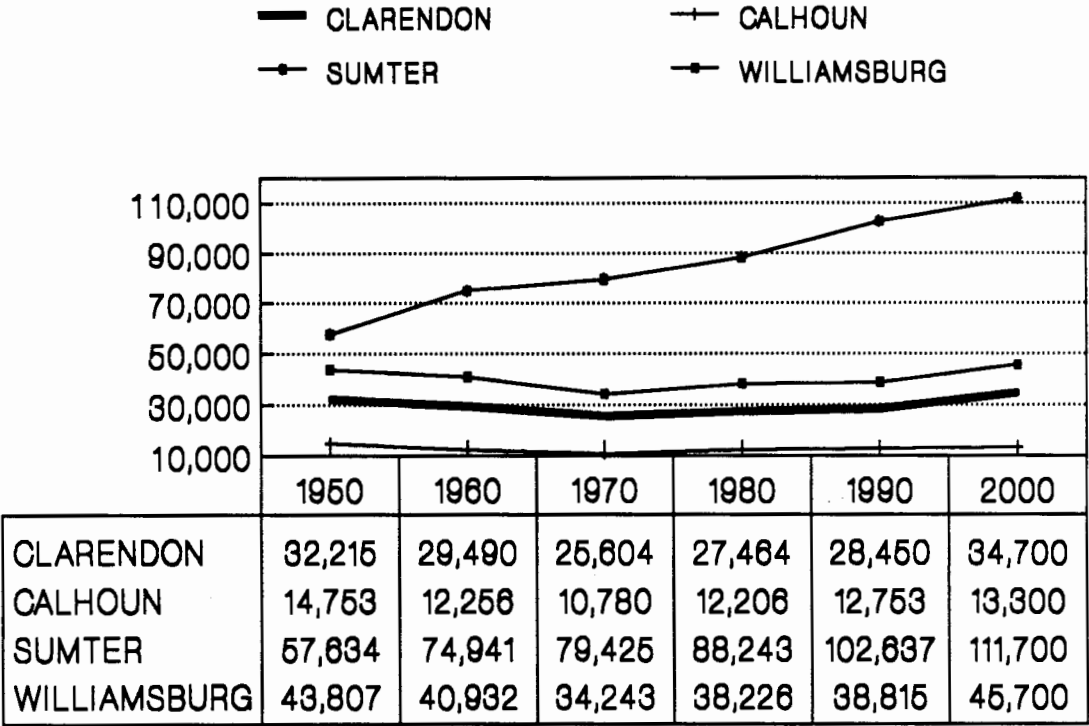
Based on the Situation Analysis, participants will identify a few crucial areas for further discussion and study. Objectives in each area will be drafted and strategies designed to reach those objectives. By forcing participants to prioritize the most important issues facing the community, strategic management promotes a sense of unity about what steps should be taken first to achieve their goal of economic success.

In order to assist communities draft and implement strategic plans, the State Development Board has enlisted the efforts of some of South Carolina's largest utility companies - Carolina Power & Light, Palmetto Economic Development Corporation, South Carolina Electric & Gas, and Southern Bell. Representatives of these companies form the Office of Rural & Community Development's "Primary Partners". A "Resource Team" of state agencies and other organizations whose primary focus is rural development have also been formed to assist participating counties with information and technical expertise. Each of these companies and organizations have committed substantial resources to deliver the LEAP process to the rural counties of South Carolina.

POPULATION

As indicated in the following chart, Clarendon County has experienced a decrease in population from 32,215 in 1950 to 28,450 in 1990, representing a 11.7% decrease in population. Sumter County is the only county in the region that experienced an increase in population, approximately 78.1%, during the same time period. Williamsburg County experienced an 11.4% decrease while Calhoun has had a 13.6% decrease during that time.

POPULATION COMPARISONS
CLARENDON AND SURROUNDING COUNTIES
1950 - 2000

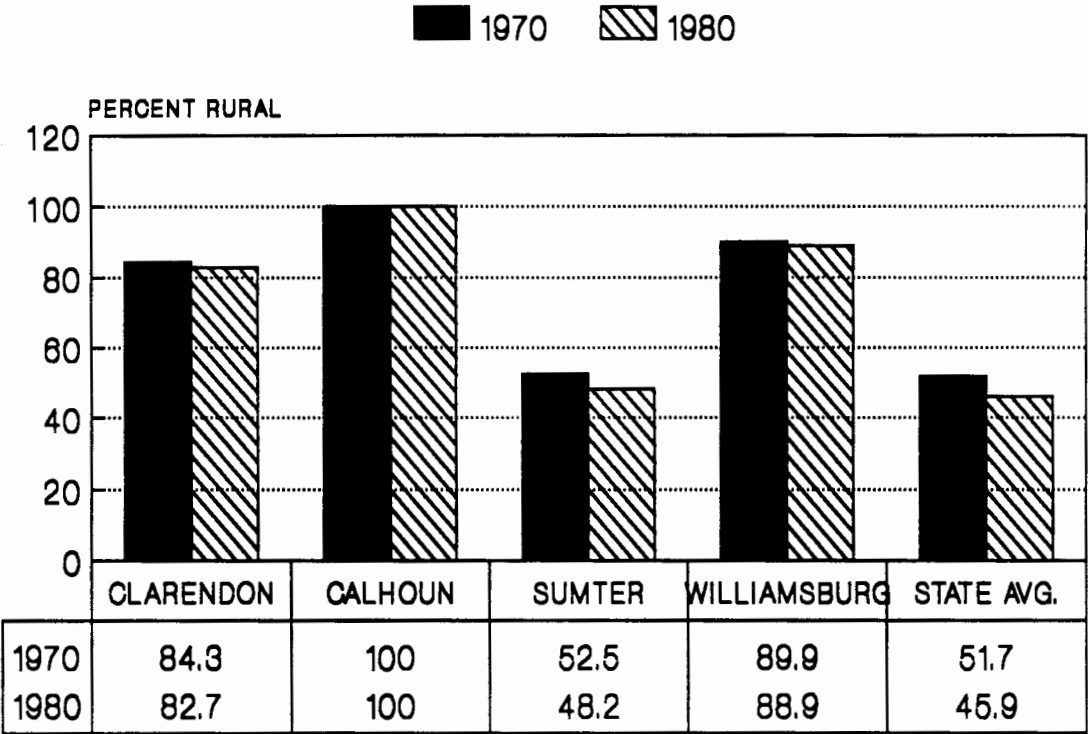


SOURCE: S. C. STATISTICAL ABSTRACT 1991;
U. S. CENSUS BUREAU

Rural Population

From 1970 until 1980, Clarendon County had a 1.6% decrease in rural population. Calhoun County had no change while Sumter had a 4.3% decrease and Williamsburg had a 1% decrease in rural population. The overall state average had a 5.8% decrease in rural population.

PERCENT RURAL POPULATION
CLARENDON, CALHOUN, SUMTER
AND WILLIAMSBURG COUNTIES 1970 - 1980

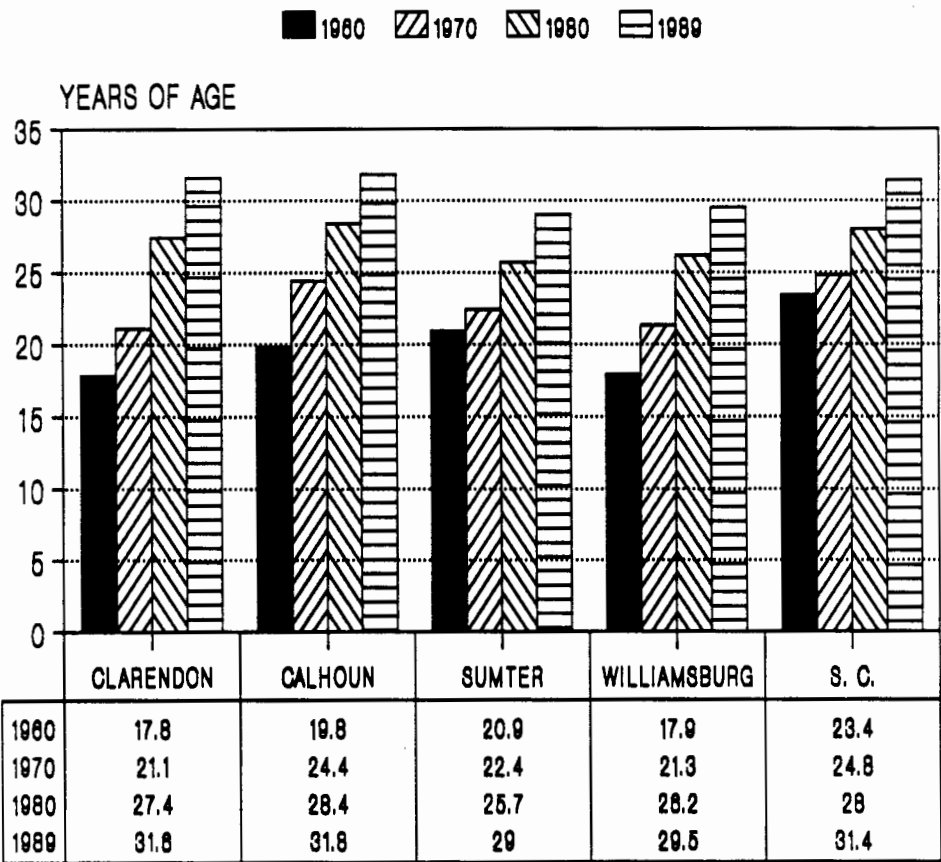


SOURCE: S. C. STATISTICAL ABSTRACT 1991

Age of Population

In 1960, the median age in Clarendon County was 17.8 years of age, well below the state average of 23.4 years. Clarendon County's median age in 1989 was 31.6 years which was slightly older than the state average of 31.4 years. Clarendon had the next to oldest median age in the region slightly below Calhoun's 31.8 years of age. Sumter and Williamsburg Counties had lower median ages with 29.0 years and 29.5 years respectively.

MEDIAN AGE OF POPULATION FOR CLARENDON
CALHOUN, SUMTER, WILLIAMSBURG COUNTIES
AND S. C. 1960 - 1989

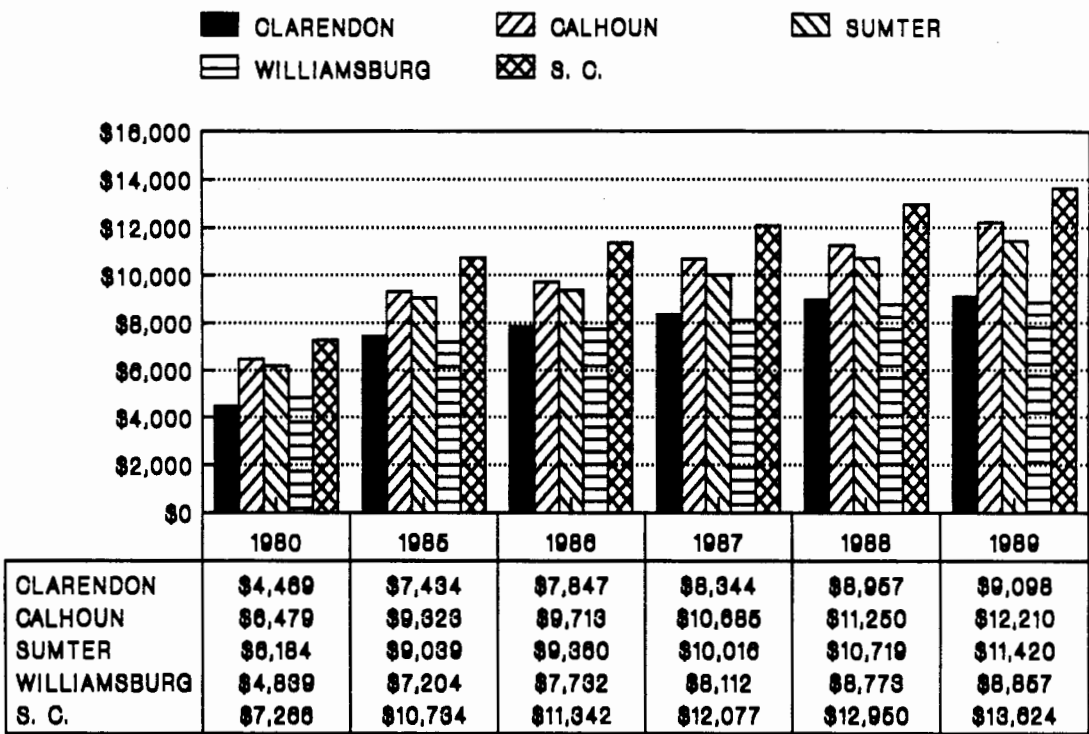


SOURCE: S. C. STATISTICAL ABSTRACT 1991

INCOME

Clarendon County has had the highest increase in per capita income, from \$4,459 to \$9,098 or 103.5%. Calhoun increased 88.5%, Sumter increased 84.6% and Williamsburg County increased 83.0%. The overall state per capita income increased 87.5% during that time period.

PER CAPITA INCOME BY
COUNTY AND FOR STATE
1980 - 1989

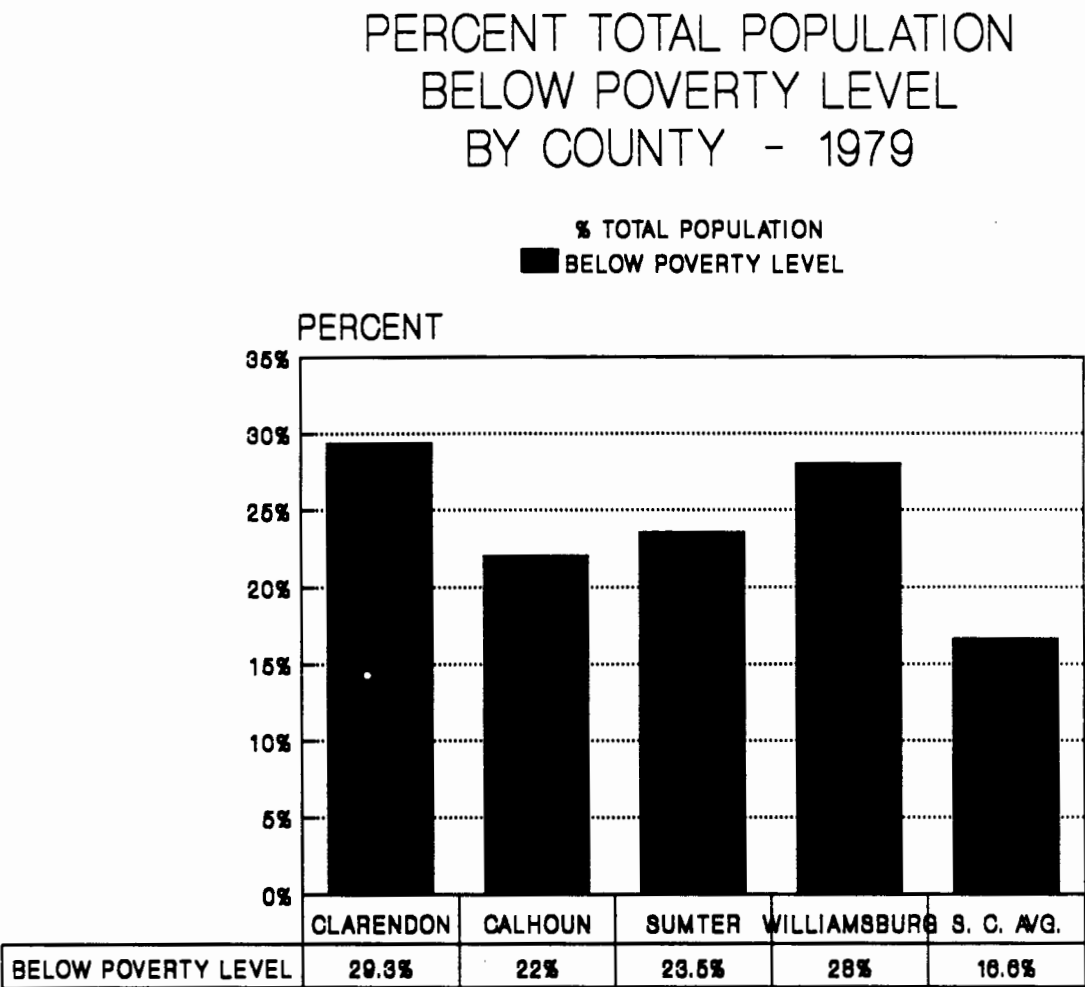


SOURCE: U S BUREAU OF ECONOMIC ANALYSIS

Even with this drastic increase, Clarendon County was 49.7% below the state's per capita income in 1989.

Poverty

Twenty-nine and three tenths percent (29.3%) of Clarendon County's population was judged to be below the poverty level in 1979. This was the highest in the region and 76.0% above the state average.

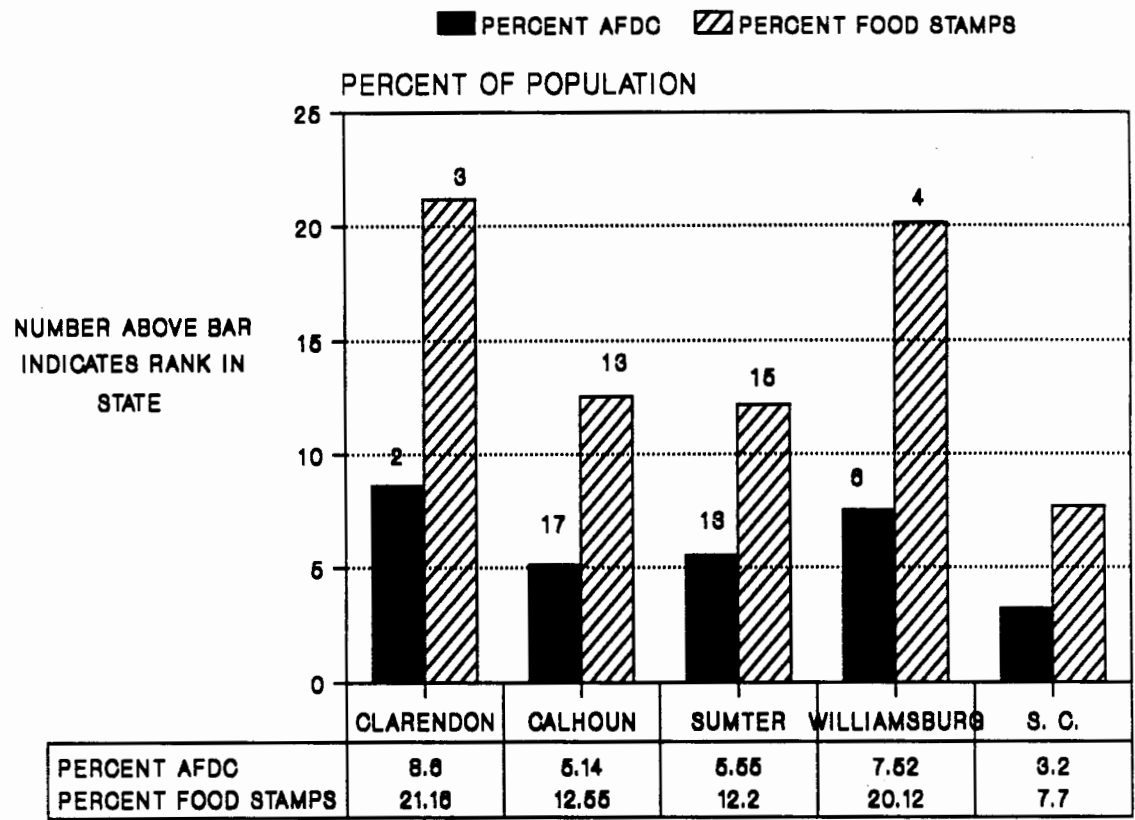


SOURCE: S. C. STATISTICAL ABSTRACT

AFDC and Food Stamps

Clarendon County ranked 2nd in the state in percent of population, 8.6%, receiving Aid to Families with Dependent Children and 3rd in the percent, 21.16%, of population receiving Food Stamps (June 1990).

PERCENT OF POPULATION PARTICIPATING IN
AFDC AND FOOD STAMPS - JUNE 1990



SOURCE: S. C. STATISTICAL ABSTRACT 1991

ECONOMIC DEVELOPMENT

Labor Force and Wages

County of Clarendon

This labor force profile examines three issues: (1) labor force characteristics, (2) the availability of labor, and (3) estimated statistics, as well as site-specific information on the labor force in Clarendon County.

LABOR FORCE CHARACTERISTICS

The composition and size of an area's labor force is linked very closely with demographic and economic conditions and trends in the region. The following labor force profile provides basic information on the population base and labor force characteristics so that the reader can better assess labor force conditions in the community.

Civilian Population:

The civilian population (excluding military personnel) in Clarendon County is 31,100.

Labor Force:

The total civilian labor force in Clarendon County is 11,920. The civilian labor force count represents all non-military employed and unemployed workers residing in the area which is being examined.

In general, South Carolina's labor force is younger than the national average and more women participate in the labor force as full-time workers. The median age in South Carolina is 31.7 (1990), compared with the nationwide average of 33.0. The following table summarizes the demographic characteristics of the working age population in the community, the county and the state.

CLARENDON COUNTY	COUNTY	SOUTH CAROLINA
Total Civilian Population (1990):	31,100	3,575,825
Distribution by Age (1990):		
18-24	10.5%	11.0%
25-44	29.6%	33.2%
45-54	9.9%	9.9%
55 & up	21.7%	19.4%
Distribution by Sex (1990):		
Male	47.4%	48.0%
Female	52.6%	52.0%
Education (Age 16-69)		
At least 12 yrs.	57.2%	63.9%
College graduate	9.0%	13.9%

Employment:

The total non-agricultural wage-and-salary employment for the county was 7,000 (Jan 1991). Employment data include all full- and part-time wage and salaried workers employed in the county. Employment statistics are compiled by place of work. Consequently, these employment statistics are based only on people who work in the county or study area. These people may or may not reside in the county or study area.

CLARENDON COUNTY	COUNTY	SOUTH CAROLINA
Employment (Jan 1991):	7,000	1,535,900
Percent Change (1980-1991):	16.9%	29.2%

Employment by Sector:

The following two tables examine the distribution of employment by sector. The table on the left compares employment by sector in 1980 and 1989. The table on the right provides a more detailed analysis of employment within the manufacturing sector in 1989.

<u>Employment By Sector</u>	<u>1980</u>	<u>1989</u>	<u>Manufacturing Employment</u>	<u>1989</u>
Construction	10.7%	7.1%	Durable Goods	37.5%
			Lumber & Wood	21.2%
Manufacturing	28.2%	22.6%	Furniture	0.0%
			Stone/clay/glass	0.0%
Transport/utilities	1.2%	3.0%	Primary Metals	0.0%
			Fabricated Metal	2.6%
Wholesale/retail	23.5%	25.1%	Machinery/not Elec	13.6%
			Elec Equipment	0.0%
Finance/insur/real est	2.3%	3.1%	Transport Equipment	0.2%
			Instruments	0.0%
Services	11.7%	15.9%	Misc.	0.0%
			Non-durable Goods	62.4%
Government	22.4%	23.1%	Food/kindred Prods	0.0%
			Textiles	0.0%
			Apparel	47.8%
			Paper/allied Prods	0.0%
			Printing/publishing	0.3%
			Chemicals	0.0%
			Rubber/plastic	14.2%
			Petroleum	0.0%
			Misc.	0.1%

Occupations:

Overall, South Carolina boasts a higher per capita percentage of craftsmen, operatives, and laborers than the average percentages for the nation or the Southeastern states. U.S. Bureau of Labor Statistics indicate that 20.2 percent of the employees in South Carolina were craftsmen, operatives, and laborers in 1987, compared with a 13.2 percent national average.

LABOR AVAILABILITY

Labor Force Participation Rate:

The labor force participation in Clarendon County is 38.3 percent. The labor force participation rate is the ratio which results from dividing the civilian labor force count by the total civilian population. South Carolina's average labor participation rate is 48.3 percent (1990). The U.S. average participation rate is 50.2 percent.

1991 LABOR FORCE PARTICIPATION RATES

	<u>COUNTY</u>
Labor Force:	11,920
Participation Rate:	38.3%

Unemployment Rate:

The unemployment rate in the county was 7.4 percent (Jan 1991), compared with the state rate of 4.3 percent. By comparison, Clarendon County's unemployment rate one year previously (Jan 1990) was 5.4 percent, and the state rate was 4.8 percent.

The unemployment rate reflects the number of individuals who are actively seeking work. The unemployment rate should be used in conjunction with other labor force data to obtain a more comprehensive picture of the availability of qualified recruitable labor. Labor can be attracted from a number of sources including the unemployed, new entrants to the labor force, the underemployed, and commuters from surrounding areas. In addition, the number of households with incomes below \$10,000 annually in a community provides additional information on a group of workers which may be available for job upgrades if wage increases and training programs are available. The following table provides estimates of the numbers of new entrants, unemployed, lower-income households, and non-participants in the labor force.

SOURCES OF LABOR SUPPLY: CLARENDON COUNTY

Estimated Number of County Residents Age 18 to 54 Who Are Not Currently Participating in the Labor Force	5,012
Estimated Number of County Residents Who Are Currently Unemployed	880
Estimated Number of County Residents Expected to Reach Age 18 Between 1988 and 1992	2,344
Estimated Number of Households Where Household Income Is Less Than \$10,000	2,759

Work Stoppage Rates:

South Carolina has consistently had one of the lowest work stoppage rates in the United States. In 1989, an average of only .001% of working time was lost due to strikes in manufacturing and non-manufacturing industries combined.

Wages and Salaries:

The average wage for all full-time and part-time wage and salaried workers in Clarendon County was \$13,468 in 1989. As the following table indicates, average wages in South Carolina overall are below the U.S. average.

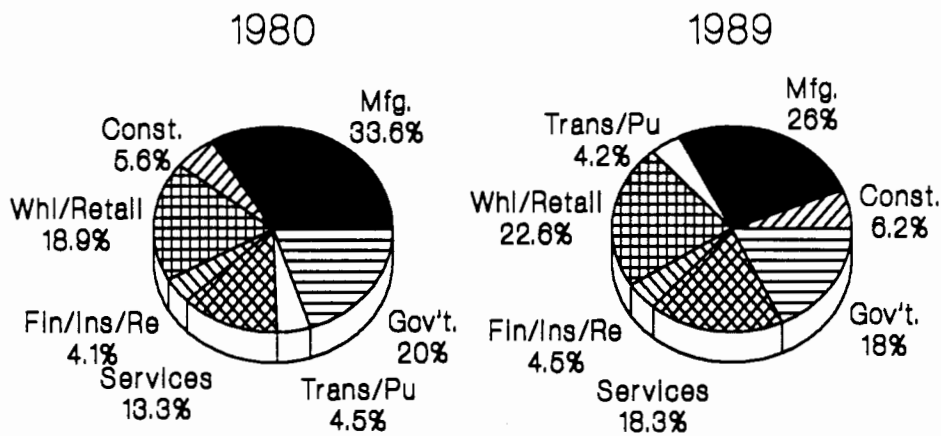
AVERAGE WAGES AND SALARIES

	<u>1989 Wages & Salaries</u>	<u>1989 Prod. Wages</u>
Clarendon County	\$13,468	N/A
South Carolina	\$18,797	\$8.51/hr.
U.S.	\$22,567	\$10.47/hr.

Employment by Sector

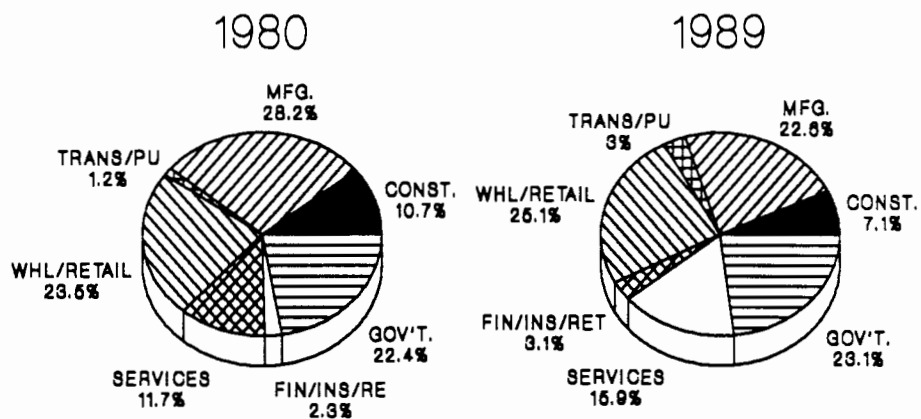
The following graphs compare Employment by Sector for South Carolina and Clarendon County for the years 1980 and 1989.

SOUTH CAROLINA EMPLOYMENT BY SECTOR
1980 AND 1989



SOURCE: S.C. COUNTY STATISTICAL PROFILES
MARCH 1991

CLARENDON COUNTY
EMPLOYMENT BY SECTOR
1980 AND 1989

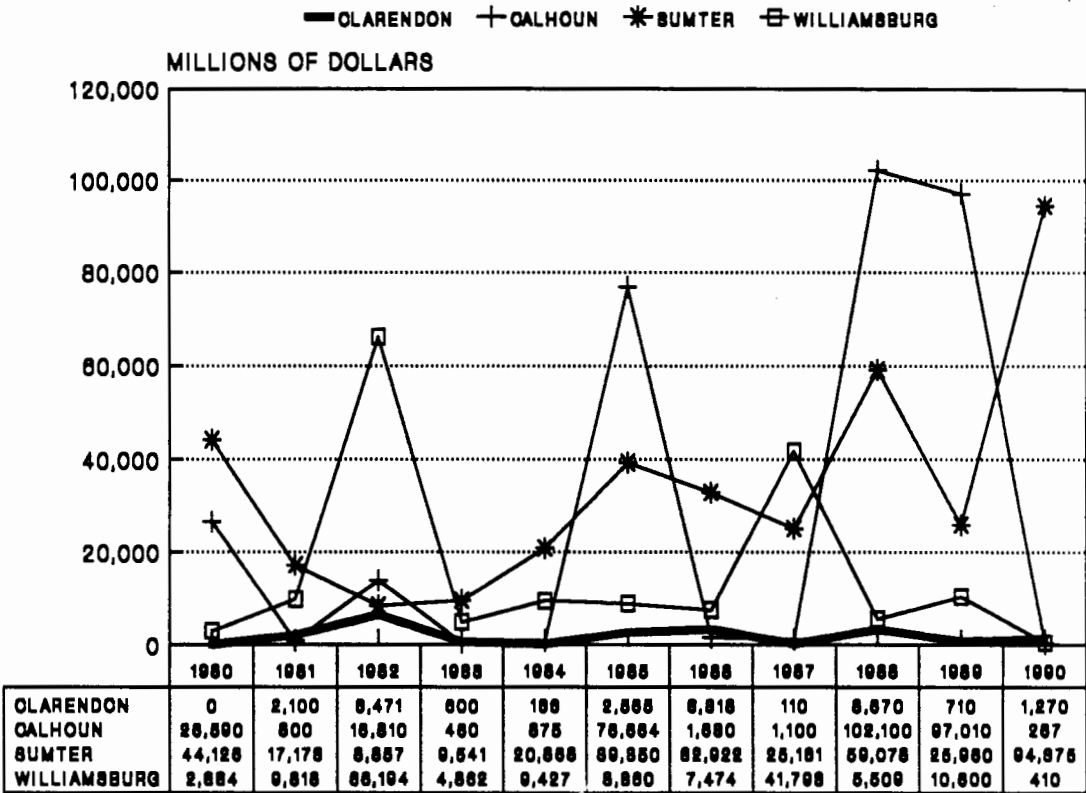


SOURCE: S. C. COUNTY STATISTICAL
PROFILES - MARCH 1991

Capital Investment/Jobs Created

Clarendon County had the least amount of capital investment in the region between 1980 and 1990 with a total of \$20,750,000 during that time. Sumter had the highest investment figures with \$376,909,000, Calhoun had a total of \$321,366,000 and Williamsburg had \$167,531,000 during the same period.

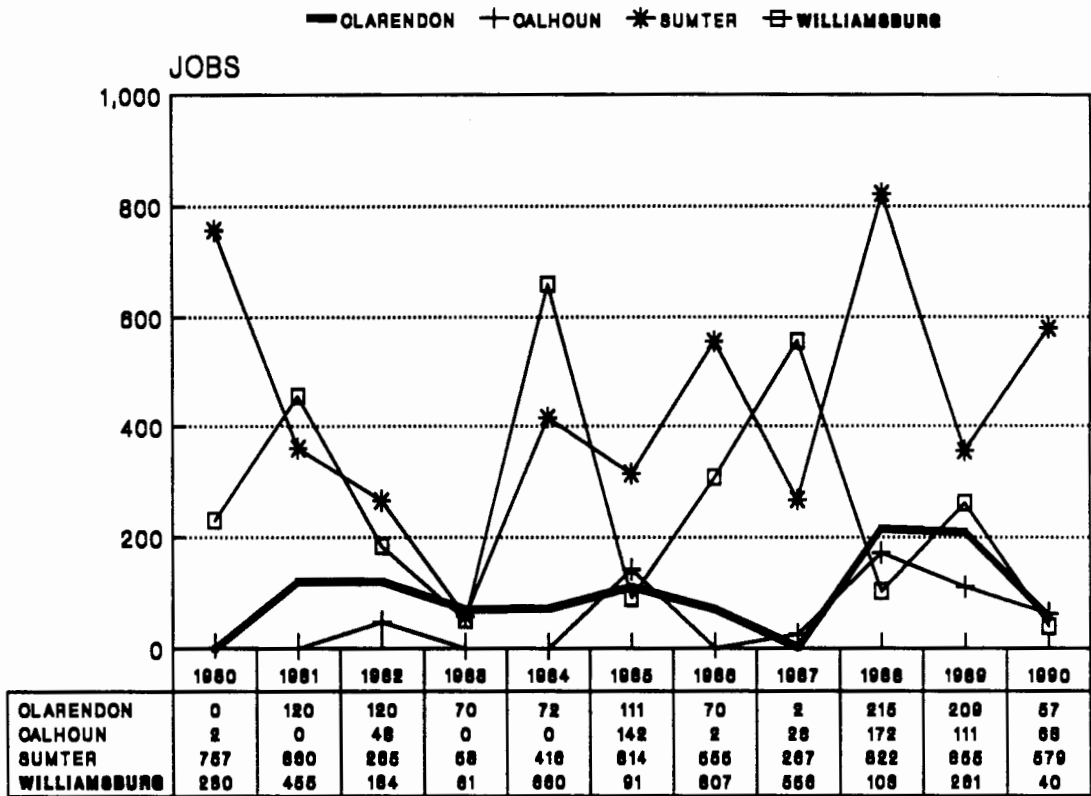
CAPITAL INVESTMENT (\$000)
BY COUNTY 1980 - 1990



SOURCE: SC COUNTY STATISTICAL PROFILES

Clarendon County was second to the lowest in the region in the number of jobs created between 1980 and 1990. Calhoun County had the least number of jobs created with a total of 566, Clarendon totaled 1,046, Williamsburg had 2,938 and Sumter had a total of 4,748 during the same time period.

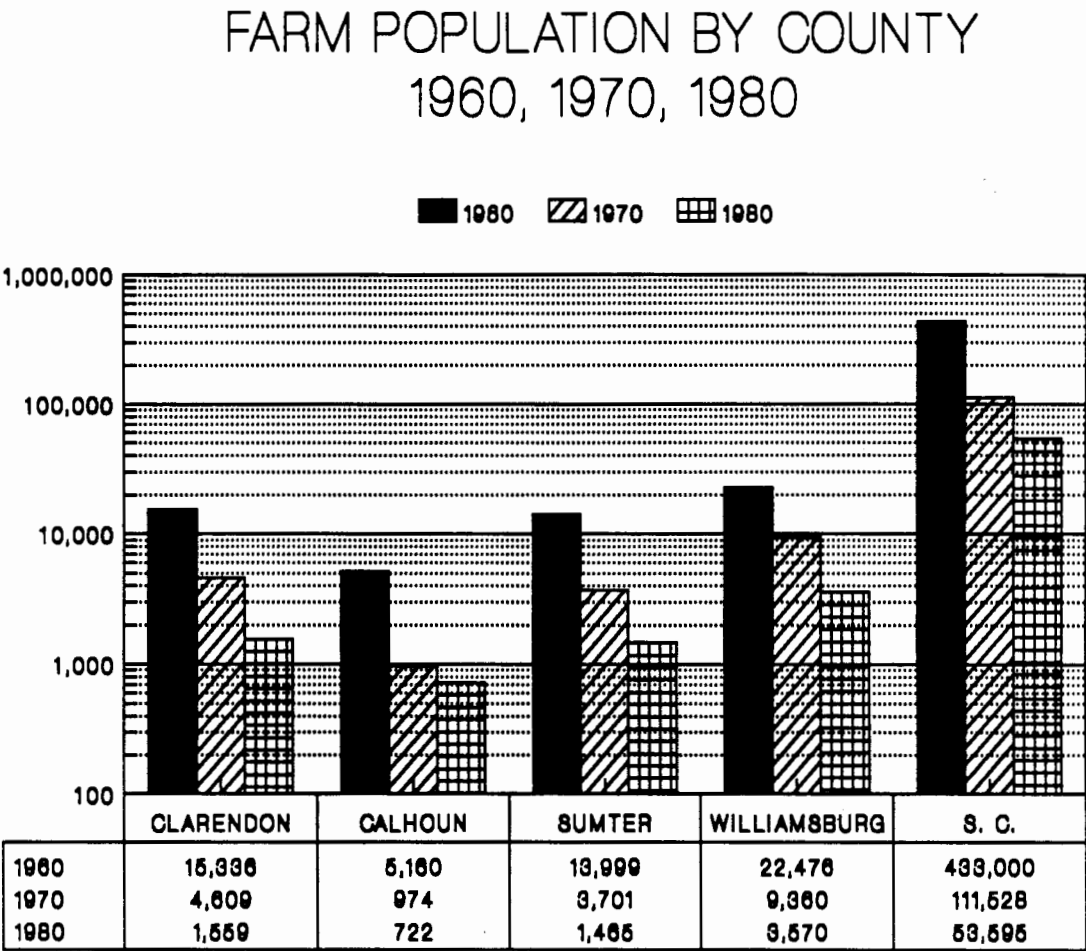
JOBS CREATED 1980 - 1990
BY COUNTY



SOURCE: SC COUNTY STATISTICAL PROFILES

AGRICULTURE

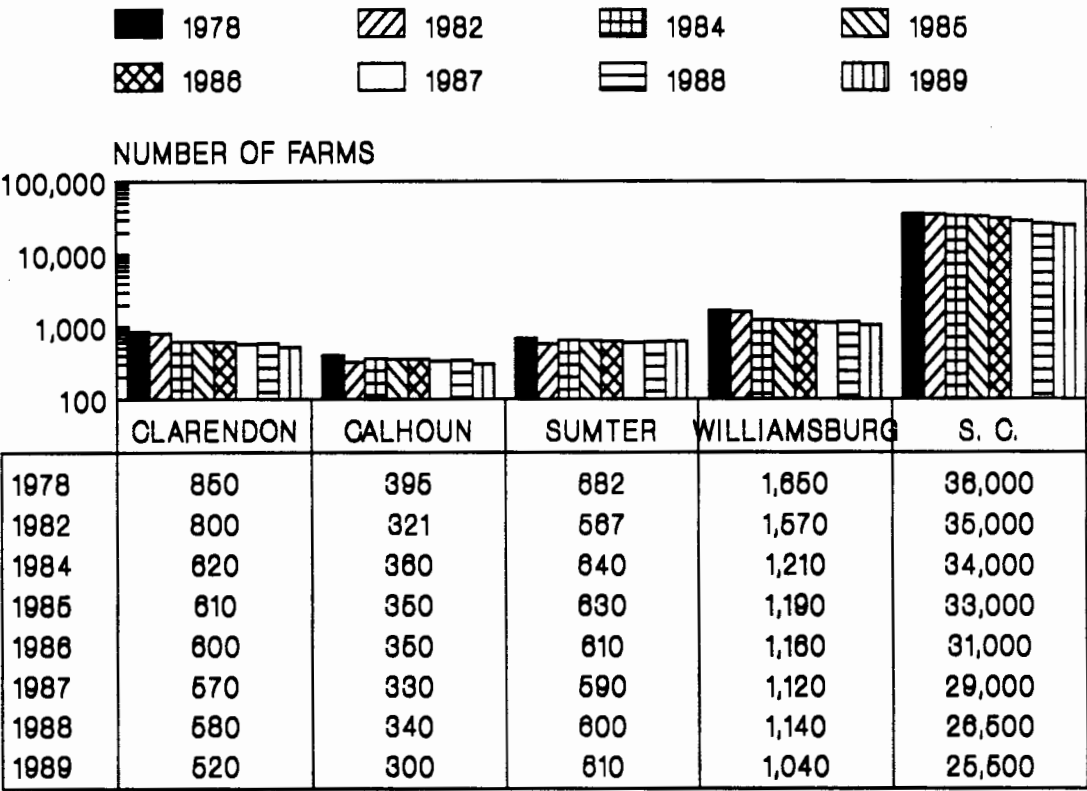
Clarendon County had an 89.9% decrease in farm population, the highest in the region, with farm population decreasing from 15,336 in 1960 to only 1,559 in 1980. Other counties in the region decreased, Sumter 89.5%, Calhoun 86.0%, Williamsburg 84.1%. The overall state average decreased by 87.6%.



SOURCE: CENSUS OF POPULATION;
1970 CENSUS OF HOUSING; AG STATISTICS SVC

Along with the loss of farm population, the number of farms for the entire region has also dropped during the period of 1978 to 1989, but not as dramatically as the farm population. Clarendon had the greatest decrease in the region, 38.8%. Williamsburg had a 36.9% decrease, Calhoun had a 24.1% decrease and Sumter had a 10.6% decrease. The overall state average had a 29.2% decrease.

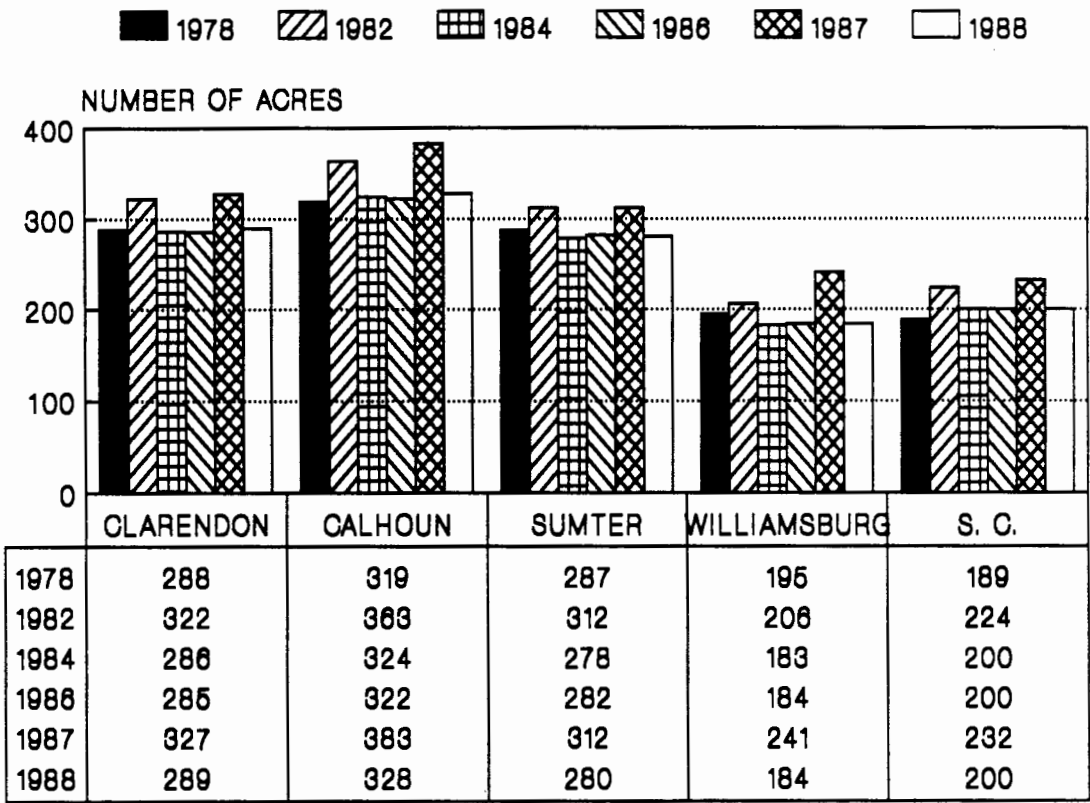
NUMBER OF FARMS BY COUNTY 1978 - 1989



SOURCE: CENSUS OF AGRICULTURE

Despite the decrease in farm population and the number of farms, the average size of farms in the region and the state has increased in size from 1978 - 1988. Clarendon had the least increase in size from 288 to 289 acres. The state had an increase from 189 to 200 acres. These numbers indicate that the trend is swinging back close to the size of farms in 1978.

AVERAGE SIZE OF FARMS
1978 - 1988



SOURCE: CENSUS OF AGRICULTURE

RETAIL SALES

The total retail sales in Clarendon County in 1989 was \$108,995,000. Following is an estimate of how many retail dollars are "leaking" out of Clarendon and the other counties in this region. Retail leakage figures are the dollars earned inside the county by county residents but are being spent outside the county. These estimates are based on a formula using per capita income levels for Clarendon and other counties in the region. The formula takes into account differing per capita income levels, but assumes similar buying patterns. These figures are based on 1989 data.

1989 RETAIL LEAKAGE

Clarendon	-\$3,673.62
Calhoun	-\$4,733.01
Sumter	-\$1,402.63
Williamsburg	-\$2,881.41

The formula for determining these figures is:

$$(A \times B) - C = D$$

Where:

A = The ratio of local per capita income to that of the state.

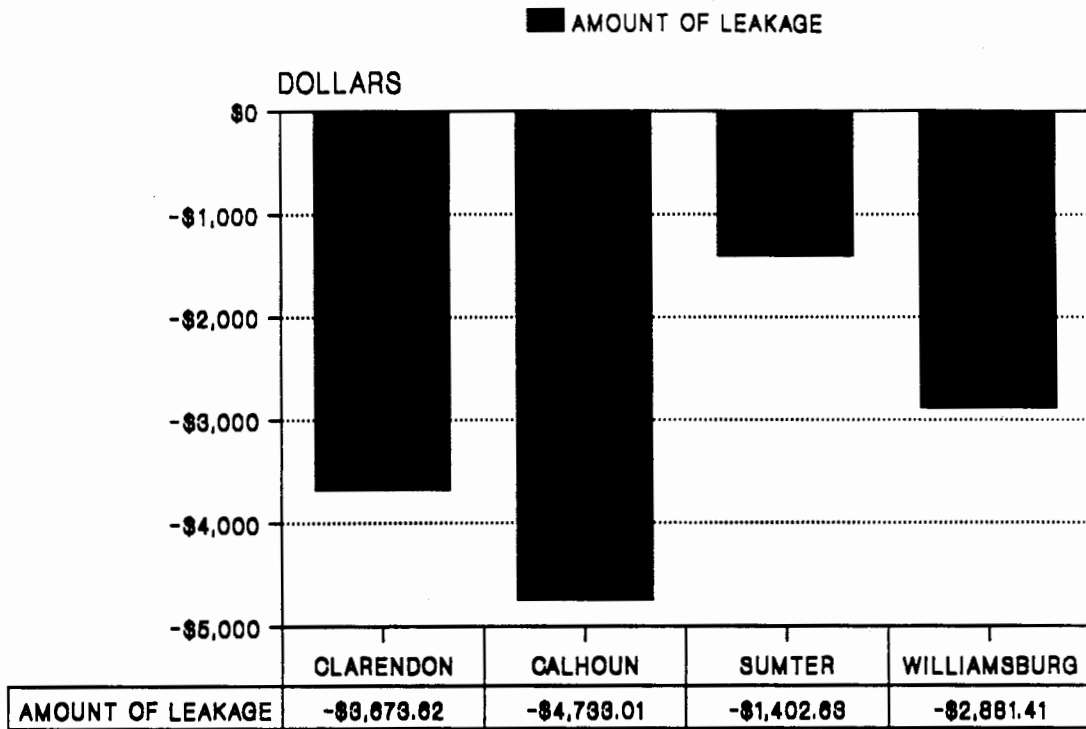
B = Local per capita sales for a given category.

C = SC per capita sales for that same category.

D = Per capita loss or gain for that category locally.

According to this model, approximately \$3,670.00 per person is being spent in retail establishments outside Clarendon County.

RETAIL LEAKAGE AS A RATIO OF STATEWIDE SPENDING FOR CLARENDON COUNTY AND REGION - 1989



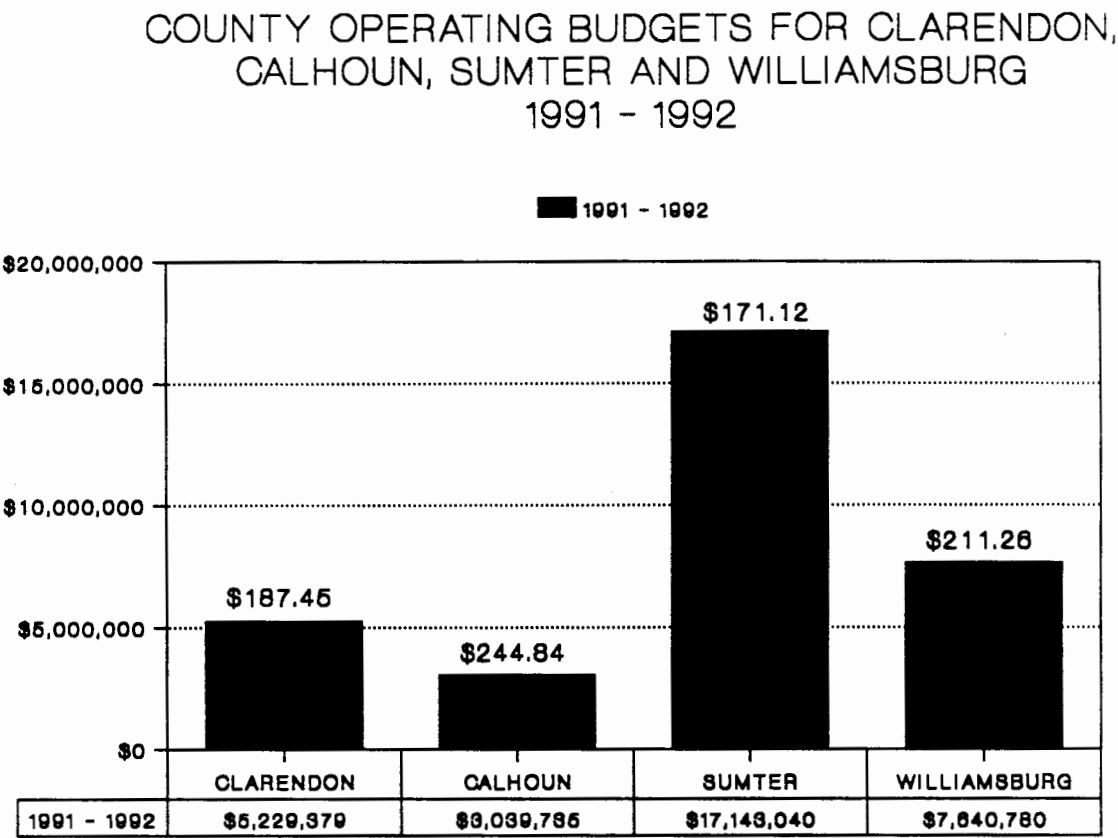
SOURCE: SALES AND MARKETING MANAGEMENT
SURVEY OF BUYING POWER

Following is additional information comparing per capita income amounts to per capita sales figures for the 1989.

	PER CAPITA INCOME 1989	PER CAPITA RETAIL SALES 1989
Clarendon	\$9,098	\$3,719.97
Calhoun	\$12,210	\$1,589.77
Sumter	\$11,420	\$5,672.87
Williamsburg	\$8,857	\$2,882.41
S. C.	\$13,624	\$6,157.79

LOCAL GOVERNMENT

The total operating budget, excluding education, for Clarendon and other counties in the region are compared in the following chart.

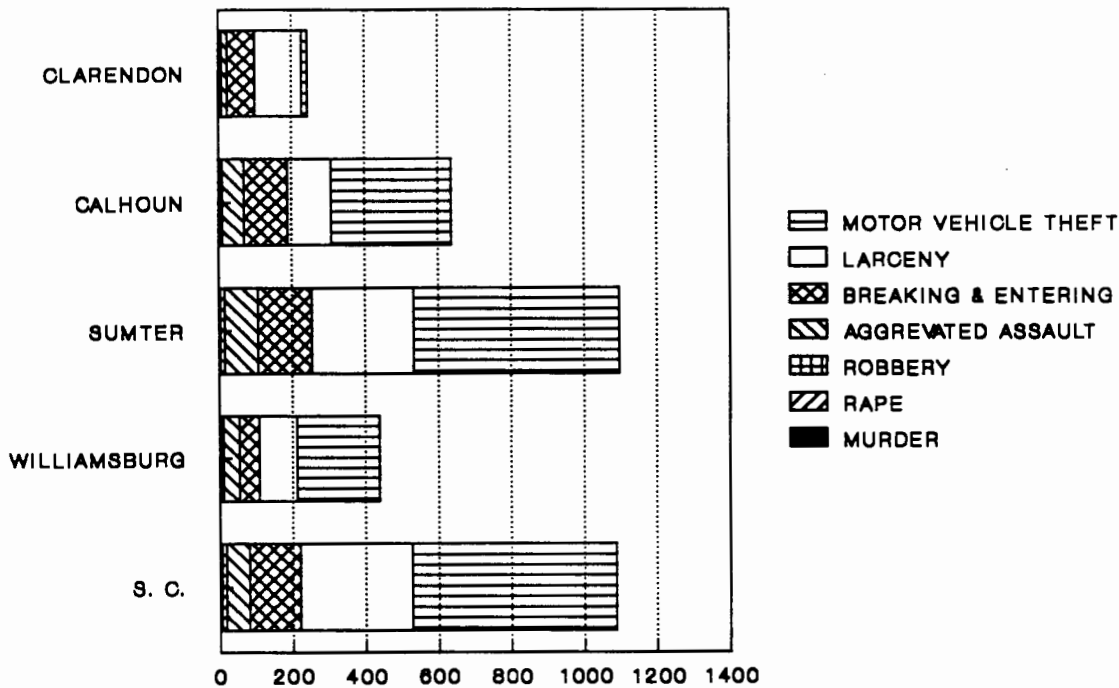


SOURCE: S. C. ASSOCIATION OF COUNTIES

The figures above the bars in this chart indicate the per capita budget amount by county. The population figures used to determine per capita are 1990 population.

Clarendon County's crime rates were below the state averages and also the lowest in the region. The highest crime rate was 126.9 for larceny compared to the state's average of 306.3. Clarendon's murder rate was .7 compared to South Carolina's rate of .9. The state's total crime index was 561.3. Clarendon County's total index was 243.4.

CRIME RATES - 1989
PER 10,000 POPULATION



SOURCE: S. C. STATISTICAL ABSTRACT 1991

INFRASTRUCTURE

Water and Sewer Capacities

All of the community water systems have excess capacity and overall the county has an excess of water available. Manning has the largest capacity and has the most excess capacity, approximately 60%.

PUBLIC WATER SYSTEM CAPACITIES
MUNICIPALITIES AND DISTRICTS

NAME OF SYSTEM	<u>TOTAL CAPACITY (MGD)</u>	<u>PEAK USAGE (MGD)</u>
ALCOLU WATER SYSTEM	.173	.102
MANNING, TOWN OF	2.300	.920
SUMMERTON, TOWN OF	.586	.230
TURBEVILLE, TOWN OF	.790	.080
BARRINEAU WATER SYS.	.422	.160
COUNTY TOTAL	4.251	1.492

SOURCE: DHEC 2/12/90

Clarendon County has three sewer systems. The largest is in Manning. In the following chart, detailed information on each system is provided. The design flow is the maximum capacity of millions of gallons per day for the system. Permit flow is what the system is permitted to use at a time and is also millions of gallons per day. The daily maximum is the peak usage per day in millions of gallons per day. The remaining flow is the excess capacity of the system.

Turbeville is in the process of upgrading and expanding its sewer system to accommodate the prison which is under construction.

CLARENDON COUNTY SEWER SYSTEMS

	DESIGN FLOW	PERMIT FLOW	MONTHLY AVG.	DAILY MAX	REMAINING FLOW
MANNING	2.5	1.350	1.8	2.5	1.15
SUMMERTON	.3490	.202	0	0	.147
TURBEVILLE	.1250	.077	.165	.308	.048

SOURCE: DHEC 5/23/91

PUBLIC EDUCATION

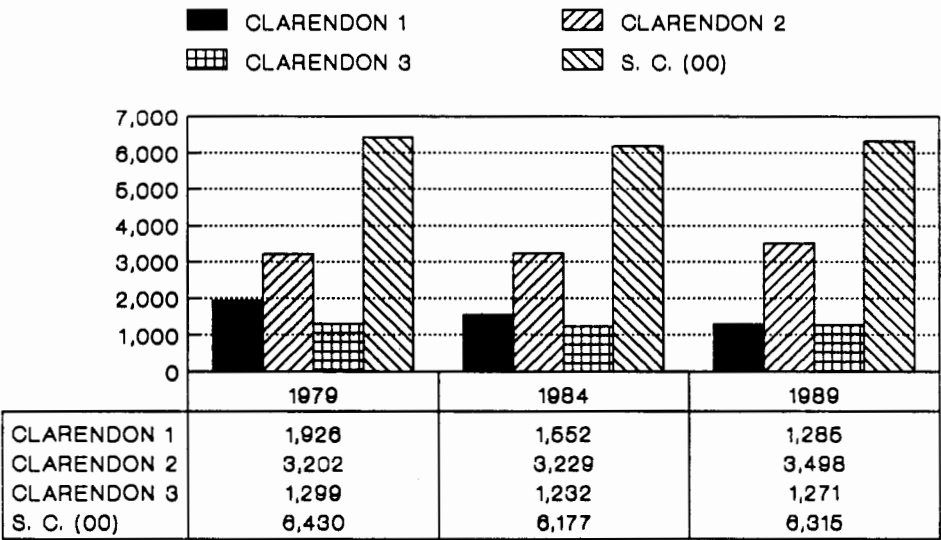
As noted below, Clarendon District 2 is the only district in the county that experienced an increase in enrollment between 1979 and 1989. The 9.2% increase was well above the state average. Clarendon 1 dropped from 1,926 enrollees in 1979 to 1,285 in 1989, a loss of 33.3%. Clarendon 3 dropped from 1,299 in 1979 to 1,271 in 1989, a loss of 2.2%. South Carolina's enrollment increased 1.8% for the same time period.

Thirty-Five Day Enrollment
Comparison of Clarendon Districts
and S. C. - 1979, 1984 and 1989

District	1979	1984	1989	Percent Change 1979 - 1989
Clarendon 1	1,926	1,552	1,285	-33.3
Clarendon 2	3,202	3,229	3,498	9.2
Clarendon 3	1,299	1,232	1,271	-2.2
S. C. (00)	6,430	6,177	6,315	1.8

Source: Rankings1978-79, 1983-84,1988-89

THIRTY-FIVE DAY ENROLLMENT COMPARISON
CLARENDON'S DISTRICTS AND THE STATE
1979, 1984 AND 1989



SOURCE: RANKINGS 1978-79, 1983-84,
1988-89

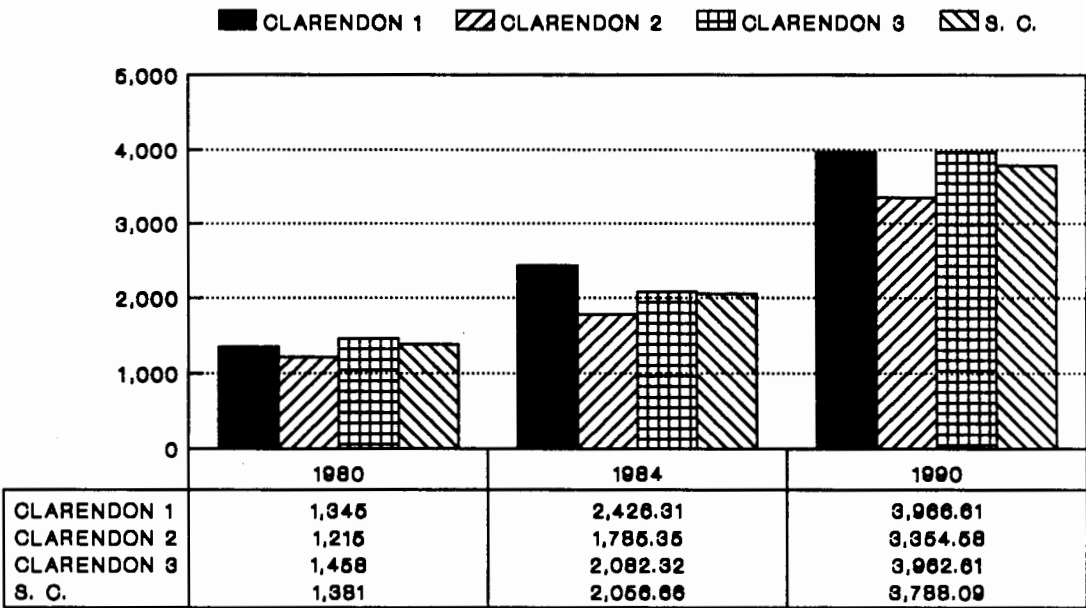
Two of the three school districts in Clarendon County exceeded the state's average increase in per pupil expenditures from 1979 to 1989. Clarendon 1 had the highest increase from \$1,345 to \$3,966.61 or 194.9%. Clarendon 2 increased from \$1,215 to \$3,354.58 or 176.1%. Clarendon 3 increased from \$1,458 to \$3,962.64 or 171.8%. South Carolina's average increase was from \$1,381 to \$3,788.09 or 174.3%. Following is detailed information of these expenditures.

**Per Pupil Expenditures (Excluding Adult Programs,
Community Services, Pupil Activities, Capital Outlay,
and Debt Service) for Clarendon County and the State
1979-80, 1983-84 & 1989-90**

District	1979-80	1983-84	1989-90	Percent Increase
Clarendon 1	\$1,345	\$1,226.30	\$3,966.61	194.9%
Clarendon 2	\$1,215	\$1,785.35	\$3,354.58	176.1%
Clarendon 3	\$1,458	\$2,082.32	\$3,962.64	171.8%
S. C.	\$1,381	\$2,056.66	\$3,788.09	174.3%

Source: Rankings1979-80, 1983-84, 1989-90

**PER PUPIL EXPENDITURES FOR CLARENDON
AND THE STATE 1979-80, 1983-84,
AND 1989-90**

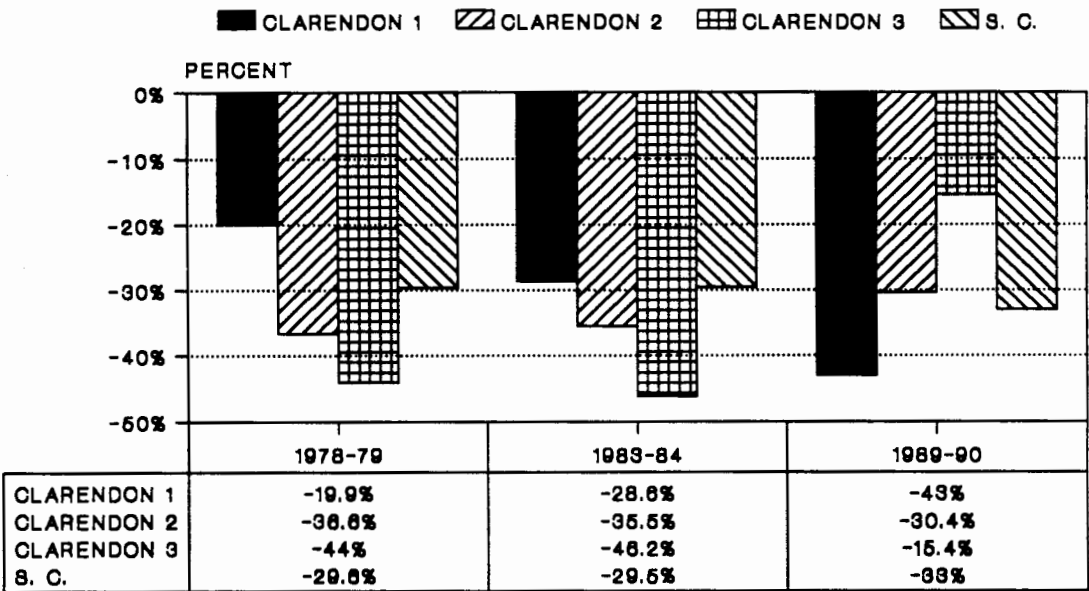


SOURCE: RANKINGS .. 1978-79, 1983-84,
AND 1989-90

Overall, Clarendon District 3 lost 35.2% of its enrollment from the 9th to the 12th grade between the school years 1978-79 and 1989-90, the highest of the three county districts. Clarendon District 2 was second highest with a 34.2% loss. Clarendon District 1 lost 30.5% during the same time. The state's overall average was 29.7%

In the school year 1989-90, Clarendon District 1 lost almost half of its enrollment from the 9th to the 12th grade. Clarendon 2 lost 30.4% and Clarendon 3 lost 15.4%. Clarendon 2 and 3 were well below the state average loss of 33.0%.

PERCENT CHANGE IN ENROLLMENT
NINTH TO TWELFTH GRADES
1978-79, 1983-84 & 1989-90



SOURCE: RANKINGS..1978-79, 1983-84,
& 1989-90

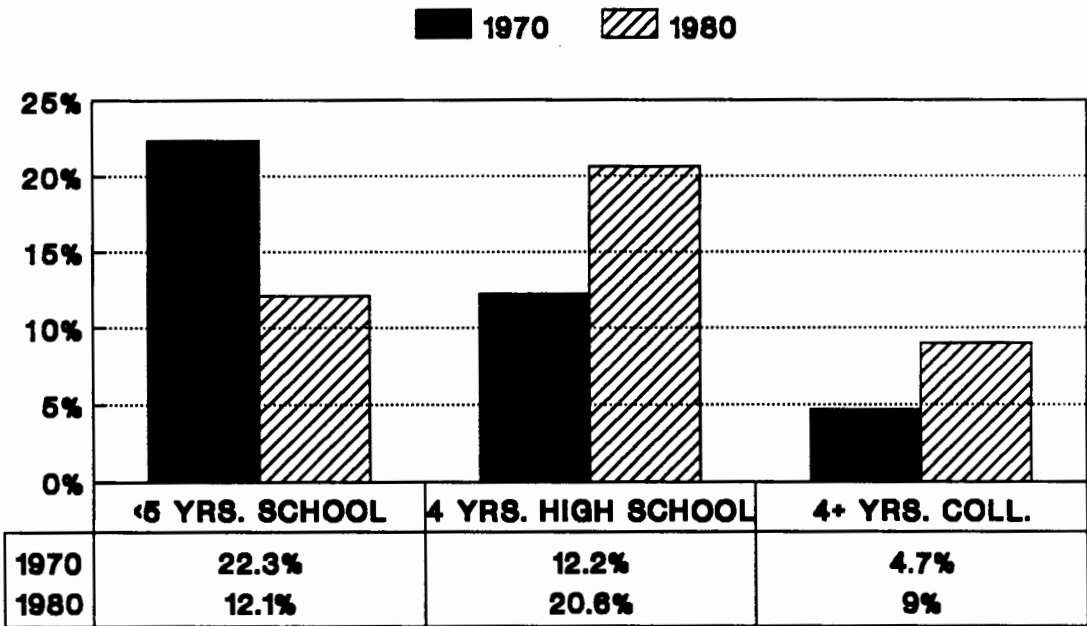
The educational level of Clarendon County's population increased dramatically from 1970 to 1980.

In 1970, almost one-fourth of the county's population had less than a 5th grade education compared to the state average of just over 12%. In 1980, 13.3 % of the county population had less than a 5th grade education compared to the state's average of 7.1%.

In 1970, 12.2% of the county's population had completed at least 4 years of high school compared to the state's average of 20.6%. In 1980, the county had increased to 41.7% of its population having 4 years of high school compared to the state's average 53.7%.

In 1970, Clarendon County had only 4.7% of its population with 4 or more years of college compared to South Carolina's average of 9%. In 1980, 8.7% of the county's population had 4 or more years of college compared to South Carolina's 13.4%.

LEVEL OF EDUCATION AMONG CLARENDON
COUNTY ADULTS 25 YRS. & OLDER
1970 AND 1980



SOURCE: S. C. STATISTICAL ABSTRACT 1991